

BY RENEE DIJULIO, senior editor

Oceanside, CA – Economic uncertainty is near an all-time high. If the economic tide rises and lifts the trade show industry, some convention and exhibition facilities will need more space. If the economy continues to sputter, the echo in some convention centers might get louder.

### Six Months Ago

When the last edition of *Trade Show Executive's Pardon Our Dust* report ran in April, economic indicators at that time still looked good. *TSE's Trending and Spending* column reported the U.S. gross domestic product had risen, the country's retail sales had jumped, various domestic housing indices were positive and

job growth was still occurring, marking three consecutive months.

Looking forward, The Conference Board's gauge of future economic activity in February had been at its highest level since 2008. *TSE*'s Forecast for the year predicted 3.2% growth in net square feet of exhibit space, 2.8% growth in number of exhibiting companies, 3.2% growth in professional attendance and 6.0% growth in revenue.

However, *TSE*'s Chief Economist Frank Chow urged caution, as did many of *TSE*'s 15-member Exposition Forecasting Board who are experts in the fields of economics and trade shows. They cited the many factors to watch: escalating energy prices, unexpected disasters, a potentially still-volatile housing market and political uncertainty. The year 2011 had started out strong but recovery slowed with Japan's earthquake, tsunami and nuclear disasters as well as shifting political and economic conditions.

#### The Present

As it turns out, 2012 may end similarly. Though the year started strong, the same factors slowing 2011's progress have been present this year. Gas and oil prices have continued to fluctuate, and jumped once again due to a natural disaster (Hurricane Isaac). Politics, particularly domestic, have been equally unforesee-

able. Business laws, regulations and taxes continue to change, and the near dead-heat between Democratic President Barack Obama and Republican Candidate Mitt Romney leading up to the 2012 U.S. presidential election has put many companies in a wait-and-see mode.

TSE's current Forecast still predicts growth: 3.7% in net square feet, 3.5% in number of exhibitors, 3.7% in attendance and 5.0% in revenue. But what does it mean for 2013?

#### The Future

The ambiguous future has some convention and exhibition facilities idling in a pre-expansion gear. There are no centers scheduled for completion on the construction calendar past 2015.

Unless a hallmark show exerts a fight or flight response when demanding an expansion (e.g., *Comic-Con* in San Diego or the *North American International Auto Show* in Detroit) or a long-term need (e.g. Jacob K. Javits Convention Center in New York), managers of convention centers will find it extremely difficult to justify an expansion or new build. Dissent can come from many groups, including citizens, politicians and the business community.

As a result, some projects have stalled. Whether they remain in limbo or move forward remains to be seen.

The actual number of projects on *TSE*'s list of proposed centers has not changed much since April. However, the venues on the list have changed as several projects previously tracked have been scrapped and new projects have entered the planning stages.

### The Impact

No movement has been made on the Renaissance Colorado Springs North since *TSE*'s last construction report. The project is still 80% complete.

The proposed Gaylord Mesa in Arizona may meet the same fate as its counterpart in Aurora, CO, in light of the latest earnings report released by Gaylord Entertainment Company, which indicates the company will not continue to invest in construction of new properties. The Gaylord Colorado Resort and Conference

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#### **Construction Calendar**

Fourteen convention centers presently populate the convention construction calendar, with three having already completed their projects in the first half of this year. One more plans to join them before the year is over. Next year, 2013 will see seven centers open doors to new space, representing the majority of projects on the calendar. Three look to 2015 for their ribbon-cutting ceremonies. Which of the proposed 25 centers will be added to the calendar next? Check back in March for our next report.

#### **1ST QUARTER 2012**

- ➤ Baton Rouge River Center, Baton Rouge, LA†
- ➤ Kalahari Convention Center, Sandusky, OH†
- > St. Cloud River's Edge Convention Center, St. Cloud, MN†

#### **4TH QUARTER 2012**

> Anaheim Convention Center, Anaheim, CA

#### **1ST QUARTER 2013**

- New Orleans Ernest N. Morial Convention Center, New Orleans, LA
- ➤ Nashville Medical Trade Center, Nashville, TN\*
- > Roland E. Powell Convention Center, Ocean City, MD

#### **2ND QUARTER 2013**

➤ Music City Center, Nashville, TN\*

#### **3RD QUARTER 2013**

- ➤ Cleveland Medical Mart & Convention Center, Cleveland, OH\*
- ➤ Dulles Expo & Conference Center, Chantilly, VA

#### **4TH QUARTER 2013**

> San Jose Convention Center, San Jose, CA

#### **1ST QUARTER 2015**

- ➤ Cobo Center, Detroit, MI
- ➤ Renaissance Colorado Springs North, Colorado Springs, CO (project on hold)\*

#### **4TH QUARTER 2015**

➤ Nova Centre, Halifax, NS, Canada\*

† Project completed \* New builds

### **Considering Construction**

There are 25 venues in the planning stages, just two more than in *Trade Show Executive*'s last construction report in April – but the list looks different. Some venues have fallen off; others have been added. Some have navigated the challenging process and made progress toward getting shovels in the ground, while a few seem stuck. Read our feature story for some status updates, and check our next report in March to see which venues have made it into the pipeline.

#### DISCUSSION

- ➤ Alliant Energy Center, Madison, WI
- ➤ Baltimore Convention Center, Baltimore, MD
- > Frontier Airlines Center, Milwaukee, WI
- ➤ KI Convention Center, Green Bay, WI
- ➤ Mayo Civic Center, Rochester, MN
- ➤ Moscone Center, San Francisco, CA
- ➤ Myrtle Beach Convention Center, Myrtle Beach, SC

#### **FEASIBILITY STUDY**

- ➤ Boise Centre, Boise, ID
- ➤ Chicago Convention Center, Chicago, IL\*

#### **FINANCING**

- ➤ AeroQuestUSA International Trade & Conference Center, Las Vegas, NV
- ➤ Gaylord Mesa, Mesa, AZ (project on hold)\*
- ➤ Miami Beach Convention Center, Miami Beach, FL
- > San Diego Convention Center, San Diego, CA
- ➤ Spokane Convention Center, Spokane, WA

#### **LEGISLATIVE APPROVAL**

- ➤ Bismarck Civic Center, Bismarck, ND
- ➤ Boston Convention & Exhibition Center, Boston, MA
- ➤ New York State Convention Center, Albany, NY\*

#### **DESIGN/SITE SELECTION**

- ➤ Allen County War Memorial Coliseum & Exposition Center, Fort Wayne, IN
- ➤ Fox Cities Convention Center, Appleton, WI\*
- ➤ Henry B. Gonzalez Convention Center, San Antonio, TX
- ➤ Kentucky International Convention Center, Louisville, KY
- ➤ Los Angeles Convention Center, Los Angeles, CA
- ➤ Oklahoma City Convention Center, Oklahoma City, OK\*
- ➤ Three Rivers Convention Center, Kennewick, WA
- ➤ Winnipeg Convention Centre, Winnipeg, MB, Canada

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Center project was abandoned when Gaylord transferred the management of its four largest properties to Marriott International; the Mesa project, which is currently on hold, looks to follow.

However, the voters of Mesa had approved incentives, and the still-supportive community would like to see another developer step in. Other centers have received similar endorsements. The San Diego Convention Center received the vote of the lodging community in April to contribute funds to its expansion project.

Other proposals with enthusiastic backing have seen support dissipate quickly. The proposed Queens Convention Center, announced with much furor by Governor Andrew M. Cuomo, has already died.

The lack of competition for financing seemed a good thing for the slowly progressing New York State Convention Center in Albany, but state funding has not yet been secured, even as the Albany Convention Center Authority has been purchasing land.

Other centers have opted for smaller, easier-to-fund-and-complete projects. The Albuquerque Convention Center is undergoing renovations that include a new exterior, ballroom remodeling and other renovations. Suburban Collection Showplace in Novi, MI is adding an attached hotel that will offer 10,000 square feet of additional meeting space.

A few centers have their fates linked to the outcome of other decisions, such as the expansion of the Los Angeles Convention Center. The project's green light is tied to the city of Los Angeles securing an NFL team that will occupy the proposed new stadium which is part of the project.

Football in Los Angeles has had its own ups and downs, and a decision to go forward requires a leap of faith by all parties. The same could be said for stalled convention center projects that have no guarantee of a busy schedule. But with so much at stake and the many uncertainties, few want to take that step.

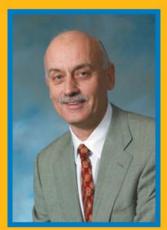
Who will jump? Check back in March for the next edition of *TSE's Pardon our Dust* to see how construction proposals and projects have progressed. **ISE** 

<sup>\*</sup> New builds

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EXHIBITION FACILITY BY LOCATION	PRE-CONSTRUCTION Exhibit & Meeting Space	POST-CONSTRUCTION Exhibit & Meeting Space	PHASE/EXPECTED Completion date	KEY FEATURES	MANAGEMENT
CALIFORNIA					
Anaheim Anaheim Convention Center 800 W. Katella Ave. Anaheim, CA 92802 www.anaheimconventioncenter.com	Prime Exhibit Space: 813,000 sf Meeting Space: 130,000 sf Breakout Rooms: 51	Prime Exhibit Space: 813,000 sf Meeting Space: 130,000 sf Breakout Rooms: 51	Phase: Construction Completion Date: December 2012	New 100,000 sf outdoor area to be completed in 2012. Dramatic rotunda with glass walls and 190 ft. ceiling in main lobby. Part of Anaheim Resort Complex including Disneyland and hotels.	Tom Morton, Executive Director, (714) 765-8920, tmorton@anaheim.net; David Meek, Convention Center Manager, (714) 765-8951, dmeek@anaheim.net
San Jose San Jose Convention Center	Prime Exhibit Space:	Prime Exhibit Space:	Phase: Construction	New flex space includes	Managed by Team San Jose.
150 W. San Carlos St. San Jose, CA 95113 www.sanjose.org  COLORADO Colorado Springs	245,000 sf Meeting Space: 49,495 sf Breakout Rooms: 31	270,000 sf Meeting Space: 63,495 sf Flex Space: 60,000 sf Breakout Rooms: 43	Completion Date: Fall 2013	a 35,000 sf ballroom and 25,000 sf of flexible meeting space. Expansion also includes 51,000 sf pre-function space and terrace; and and renovation and integration of existing convention center.	Diana Ponton, Director of Sales, (408) 792-4109, dponton@sanjose.org
Renaissance Colorado Springs North 9494 Federal Dr. Colorado Springs, CO 80921 www.marriott.com	New Facility	Prime Exhibit Space/ Meeting Space: 50,000 sf Breakout Rooms: 18	Phase: Construction on hold; 80% complete Completion Date: January 2015	300 guest rooms.	Managed by John Q. Hammons Hotels & Resorts. (719) 265-8500
LOUISIANA New Orleans					
New Orleans Ernest N. Morial Convention Center 900 Convention Center Blvd. New Orleans, LA 70130 www.mccno.com	Prime Exhibit Space: 1,100,000 sf Meeting Space: 200,000 sf Breakout Rooms: 140	Prime Exhibit Space: 1,100,000 sf Meeting Space: 200,000 sf Flex Space: 60,000 sf Breakout Rooms: 140	Phase: Construction Completion Date: January 2013	S50 MIL exterior/ball-room renovation to open in 2013 with 60,000 sf Great Hall, Junior Ballroom with rooftop terrace and executive club lounge. Walk to 20,000 hotel rooms, restaurants and Arts District.	Tim Hemphill, VP, Sales & Marketing, (504) 582-3023, themphill@mccno.com; Keith Levey, Director of Sales, (504) 582-3023, klevey@mccno.com
MARYLAND George City					
Convention Center 4001 Coastal Hwy. Ocean City, MD 21842 www.ococean.com	Prime Exhibit Space: 67,000 sf Meeting Space: 45,000 sf Flex Space: 25,000 sf Breakout Rooms: 22	Prime Exhibit Space: 93,180 sf Meeting Space: 45,000 sf Flex Space: 25,000 sf Breakout Rooms: 22	Phase: Design/ site preparation Completion Date: Q1 2013	Located along the Isle of Wight Bay. Free parking. City has 9,500 hotel rooms, with 4,850 committable to groups year-round.	Fred Wise, CHAE, Director of Sales & Marketing, (410) 289-8181, fwise@ococean.com



- 550,000 sq. ft. of total convention space
- 125,000 sq. ft. of new convention space
- 39,000 sq. ft. of flexible meeting space
- 35,110 sq. ft. new Grand Ballroom
- Complete convention center renovation



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EXHIBITION FACILITY BY LOCATION	PRE-CONSTRUCTION Exhibit & Meeting Space	POST-CONSTRUCTION Exhibit & Meeting Space	PHASE/EXPECTED Completion date	KEY FEATURES	MANAGEMENT
MICHIGAN Detroit					
Cobo Center One Washington Blvd. Detroit, MI 48226 www.cobocenter.com  OHIO Cleveland	Prime Exhibit Space: 722,500 sf Meeting Space: 178,000 sf Breakout Rooms: 80	Prime Exhibit Space: 722,500 sf Meeting Space: 255,500 sf Flex Space: 50,000 sf Breakout Rooms: TBD	Phase: Construction Completion Date: January 2015	5 exhibit halls; 4 on main level have 600,000 sf contiguous space. Riverview Ballroom and 5 banquet rooms offer riverfront views. Adjacent arena.	Managed by SMG. Thom Connors, General Manager, (313) 877-8777, tconnors@cobocenter.com; Tom Albrecht, Director of Sales, (313) 877-8777, talbrecht@cobocenter.com
Cleveland Medical Mart & Convention Center Cleveland, OH 44114 www.clevelandconventions.com  TENNESSEE Nashville	New Facility	Prime Exhibit Space: 230,000 sf Meeting Space: 90,000 sf Breakout Rooms: TBD	Phase: Construction Completion Date: Summer 2013	Centrally located near downtown hotels, rest-aurants and attractions. Brand new, state-of-the-art facility with flexible meeting space. 32,000 sf Grand Ball-room overlooking Lake Erie; 11,000 sf Junior Ballroom with outdoor patio access. Less than 15 minutes from airport.	Brian Casey, CEM, VP & General Manager, (216) 920-1444, bcasey@mmart.com; Tony Prusak, Senior Director of Convention Sales, (216) 920-1430, tprusak@mmart.com
Music City Center Nashville, TN www.nashvillemusiccitycenter.com	New Facility	Prime Exhibit Space: 350,000 sf Meeting Space: TBD Breakout Rooms: 50	Phase: Construction Completion Date: April 2013	Grand ballroom holds up to 6,000 for seated dinner; 2 ballrooms; 32 loading docks; designed to meet LEED Silver certification.	Kay Witt, Senior VP of Sales, Nasvhille Convention & Visitors Bureau, (615) 259-4739, kayw@visitmusiccity.com

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EXHIBITION FACILITY BY LOCATION	PRE-CONSTRUCTION Exhibit & Meeting Space	POST-CONSTRUCTION Exhibit & Meeting Space	PHASE/EXPECTED COMPLETION DATE	KEY FEATURES	MANAGEMENT	
TENNESSEE Nashville Medical Trade Center 601 Commerce St. Nashville, TN 37203 www.nmtc.com  VIRGINIA Chantilly	New Facility	Prime Exhibit Space: 140,000 sf Meeting Space: TBD Breakout Rooms: TBD	Phase: Construction Completion Date: Q1 2013	Project involves construction of multiple stories on existing convention center site. To feature permanent showrooms, temporary exhibition space and training and education facilities. Connected to 673-room hotel	Managed by Market Center Management Co., Ltd. David Osborn, General Manager, (866) 878-8778, dosborn@mcmcmail.com	
Dulles Expo & Conference Center P.O. Box 221075 Chantilly, VA 20153 www.dullesexpo.com  CANADA: NOVA SCOTIA Halifax	Prime Exhibit Space: 100,000 sf Meeting Space: None	Prime Exhibit Space: 130,000 sf Meeting Space: None	Phase: Construction Completion Date: Summer 2013	Near Dulles Airport. 2,400 free parking spaces. 233-room, onsite, full-service hotel.	Bob Morgan, General Manager, (703) 766-1308, rmorgan@dullesexpo.com	
Nova Centre Halifax, NS, Canada www.novacentre.ca	New Facility	Prime Exhibit Space: 289,000 sf Meeting Space: TBD Breakout Rooms: TBD	Phase: Design Completion Date: December 2015	Part of a complex that also includes a hotel and retail.	Rank Inc., info@novacentre.ca	
CONVENTION CENTER CONSTRUCTION SNAPSHOT:  No. of North American Convention Centers  Meeting Space to be Added  181,500 sf						
Undergoing Construction Considering Construction		11 25	Through Expansions New Builds		91,500 sf 90,000 sf	
<b>Prime Exhibit Space to be Added</b> Through Expansions New Builds		<b>1,140,180 sf</b> 81,180 sf 1,059,000 sf	Flex Space to be Added Through Expansions New Builds		<b>120,000 sf</b> 120,000 sf None	

# Timing is Everything Be Among the First to Know when Important News Breaks! 55

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